Teaching Aid:  
Improving Time Management

Service Delivery

Checklists



## Suggested Strategy:

Using checklists can save you time. After your first meeting with a customer, you can use these checklists to help develop your agenda for follow-up meetings. They can also help you write your case notes. Ask an MIS specialist if there is some way to embed a list into your Case Notes writing program. That way you can structure your case note entries using these key elements.

#### Six Elements of Most Case Note Entries:

* Customer’s situation or background at that time
* Reason for this particular visit
* Goals that have been set previously
* Progress toward achieving those goals
* Next steps and new goals
* Case closing (if relevant)

#### Brief examples of the Who, What, Where, When, Why, and How:

* Who are you writing about?
* What significant event are you recording?
* Where did this happen? Where can they be reached?
* When did this event occur? When will it occur?
* Why is this significant? Why are you recommending this?
* How does this connect with overall goals of employment, training, support services?

## Suggested Strategy:

#### Checklist to Report Customer’s Status

Refer to this checklist as you think about your customer’s status and your service delivery.

Share your thoughts about this list with colleagues: are components missing? Can the list be organized better? Adapt the checklist as it suits your situation and your AJC. Compare this list to the Individual Employment Plan (IEP) form you use to see if the list should be adjusted.

If you are asked by a supervisor or a colleague about a customer’s status, you can use the list to report the “step-by-step” process of engagement with the customer. It can also help you propose next steps and action plans during your customer meetings.

**Welcome, orientation and triage**

**Program eligibility**

**Enrollment**

**Up to date Contact Information**

**Assessments**

* Literacy and numeracy
* Other basic skills
* Aptitudes
* Abilities
* Interests
* Identification of skill gaps
* Job readiness
* Financial stability

**Challenges**

* Barriers to employment
* Disabilities

**Referrals to training**

**Referrals to support services**

* Child care
* Transportation
* Health care
* Nutrition
* Financial counseling
* TANF cash benefits
* Unemployment benefits

**Other education needs, financial aid**

**Completions**

**Group activities**

**Job Search**

* Research
* Job & occupation targeting
* Resume development
* Interview skills
* Marketing plan

**Placement**

**Employer incentives**

* On the job training
* Registered Apprenticeship
* Federal bonding
* Tax credits

**Follow-Up services**

**Disciplinary actions**